

# Direct Access

## Quick Reference Guide

### CUSTOMER SUPPORT

**Customer Care:** (785) 339-3540 Ext. 1

**Email:** [Direct-Access@hrrsic.uscg.mil](mailto:Direct-Access@hrrsic.uscg.mil)

**On-line Help:** <http://cgweb.uscg.mil/q-w/hrrsic/Direct-Access>

**Self-Service Tutorials:**

<http://www.uscg.mil/hq/hrrsic/training/>

### EMPLOYEE REVIEW

- Before you begin, if possible, have member's Employee ID number. If you do not have member's Employee ID number, you may perform a search and select from the list that is displayed as a result of your search criteria. For information on searching, reference the CGHRMS On-Line Help at <http://cgweb.uscg.mil/q-w/hrrsic/Direct-Access>. (Select Using CGHRMS, then select Search Tips).
- Your view of any menu or page is dependent on your access level (user role) and the security settings associated with that access. Your Operator ID may not have access to all the pages we include in this guide, or we may show a field as editable, but your access is "View Only".
- Command User (CGSSCMD) or Employee Review Only (CGEMPREV) access is required to complete an Employee Review. To request this access, complete form CG HRSIC-7421/2 User Authorization/Revocation. Fax completed form to (785) 339-3772. Be sure to indicate all access (roles) you currently have and are requesting.
- If you change the **Effective** or **To** date, **all** data entered in the Employee Review will be lost.
- The path to access Employee Review is: Develop Workforce > Plan Careers > Use > Employee Review.

#### Employee Review

#### Find an Existing

EmpID:

Empl Rcd Nbr:

Name:

Last Name:

SetID:

Department:

National ID:

Job Family:

Job Code:

Company:

**Develop Workforce > Plan Careers > Use > Employee Review**

Enter Employee ID number in the EmpID field.

OR

Enter SSN in the National ID field.

Click "Search" after entering Employee ID number or SSN.

- It is not necessary to enter data in all fields. Preferred method is to enter Employee ID number (EmpID field) **or** SSN (National ID field).
- If you do not know the Employee ID or SSN, provide some search criteria, such as member's last name or member's name in the appropriate fields and perform a search.
- Since an employee may have multiple records, reflecting various stages in their career (military, civilian, reservist) or the result may list several members with the same last name and/or first name, **it is important to select the correct record from the result list.**

# Employee Review

### EMPLOYEE REVIEW (continuation)

- **Page defaults to Employee Review tab. Additional tabs include Reviewers, Comments, and Exceptions. This guide includes instruction on all tabs.**
- **You can save your work at anytime during this process.** The review does not have to be completed before you can save it. Frequent saves prevent the loss of data in the event of computer problems. After the review is saved, you can exit the system and return to it later to finish up.
- **Employee Review Tab - Fields which must be completed:**
  - Effective Date (Enter the period end date)
  - To Date (Enter the period end date)
  - Review Type
  - Rating Scale

**Note: If the Effective or To date is changed after data is entered in other fields, all data entered in the Employee Review will be lost.**
- **Employee Review Tab - Fields which may be left blank:**
  - From Date
  - Next Review Date

#### Page Defaults to the Employee Review Tab

Home > Develop Workforce > Plan Careers > Use > Employee Review

Employee Name:  Employee ID: 1234567 Empl Rcd#: 0

Review Details

Effective Date:  Review Type:

From To Date:   Next Review Date:

Business Unit: AUSCG All U. S. Coast Guard Units

Department: 000450 CG HRSIC

Job Code: 436093 First Class Yeoman

Rating Scale:  First Class PO Review

Rating Model: EVAL Enlisted Performance Eval

Enter the period end date in the Effective date field and the To date field.

Click the Review Type drop-down arrow and select the appropriate type.

Enter the appropriate rate (E1, E2, E3, etc..) or click on the magnifying glass to the right of the Rating Scale field and follow the steps below to select a Rating.

#### Lookup Rating Scale

Rating Scale:

Description:

Click on **Lookup** or enter criteria in the Description field then click **Lookup**. Refer to CGHRMS On-Line Help or Basics 101 User Guide for entering criteria.

#### Search Results


View All First 1/1

| Rating Scale | Description                |
|--------------|----------------------------|
| E1           | Seaman Recru               |
| E2           | Seaman Appre               |
| E3           | Seaman Review              |
| E4           | Third Class PO             |
| E5           | Second Class PO Review     |
| E6           | First Class PO Review      |
| E7           | Chief Petty Officer Review |

Select Rating (E-1 thru E-9) or Description. Do not use CPO, DUI1, etc.. Once you click on the rating or description it will return to the Employee Review page and automatically fill-in the field and display the description to the right of the field.

## EMPLOYEE REVIEW (continuation)

After entering the necessary information on the **Employee Review** page, click the **Reviewers** tab at the top of the page.

- **Evaluation Type.** Click on the Evaluation Type drop-down arrow and select the appropriate type.
- **Reviewer ID.** Enter or lookup the Employee ID number of the reviewer.
- The competencies (e.g. Directing Others, etc..) listed are based on the rating scale entered on the first page.
- Use the numeric values to rate all competencies except **Conduct** and **Recommendation for Advancement**.
- Use **Satisfactory** or **Unsatisfactory** to rate the **Conduct** competency. (A message will display indicating the alpha characters will not compute for the rating average, click **OK**.)
- Use **Recommended for Adv** or **Not Recommended for Adv** to rate the **Recommendation for Advancement** competency. E-6's and above require comments justifying the members future potential for leadership. (A message will display indicating the alpha characters will not compute for the rating average, click **OK**.)
- Click on the  (Note) button to view the full description of the competency and enter Comments in the Comment section. **These comments replace the Administrative Remarks (CG-3307).**

### Click on the Reviewers Tab

Employee Name: [ ] Employee ID: 1234567 Empl Rcd#: 0

Review Date: [ ] Reviewer ID: [1234567] Factor Weight: [ ]

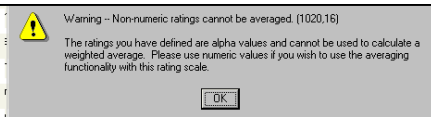
Evaluation Type: Supervisor

| Competency | Description                    | Weight (%) | Rating | Short Desc |
|------------|--------------------------------|------------|--------|------------|
| EPL1C      | Directing Others               | 10         | 5      | Above Avg  |
| EPL2C      | Supervision                    | 10         | 7      | Superior   |
| EPL3C      | Teamwork                       | 10         | 5      | Above Avg  |
| EPL4C      | Communication                  | 10         | 6      | Excellent  |
| EPL5C      | Integrity                      | 10         | 5      | Above Avg  |
| EPL6C      | Leadership                     | 10         | 6      | Excellent  |
| EPL7C      | Customer Service               | 10         | 6      | Excellent  |
| EPL8C      | Teamwork                       | 10         | 6      | Excellent  |
| EPL9C      | Communication                  | 10         | 5      | Above Avg  |
| EPL10C     | Teamwork                       | 10         | 7      | Superior   |
| EPL11C     | Communication                  | 10         | 6      | Excellent  |
| EPP4C      | Using Resources                | 10         | 5      | Above Avg  |
| EPP5C      | Safety                         | 10         | 5      | Above Avg  |
| EPP6C      | Stamina                        | 10         | 5      | Above Avg  |
| EPP7C      | Communication                  | 10         | 5      | Above Avg  |
| EPP8C      | Communication                  | 10         | 5      | Above Avg  |
| EPP9C      | Communication                  | 10         | 5      | Above Avg  |
| EPP10C     | Communication                  | 10         | 5      | Above Avg  |
| EPP11C     | Communication                  | 10         | 5      | Above Avg  |
| EPP12C     | Communication                  | 10         | 5      | Above Avg  |
| EPP13C     | Communication                  | 10         | 5      | Above Avg  |
| EPP14C     | Communication                  | 10         | 5      | Above Avg  |
| EPP15C     | Communication                  | 10         | 5      | Above Avg  |
| EPP16C     | Communication                  | 10         | 5      | Above Avg  |
| EPP17C     | Communication                  | 10         | 5      | Above Avg  |
| EPP18C     | Communication                  | 10         | 5      | Above Avg  |
| EPP19C     | Communication                  | 10         | 5      | Above Avg  |
| EPP20C     | Communication                  | 10         | 5      | Above Avg  |
| EPP21C     | Communication                  | 10         | 5      | Above Avg  |
| EPP22C     | Communication                  | 10         | 5      | Above Avg  |
| EPP23C     | Communication                  | 10         | 5      | Above Avg  |
| EPP24C     | Communication                  | 10         | 5      | Above Avg  |
| EPP25C     | Communication                  | 10         | 5      | Above Avg  |
| EPP26C     | Communication                  | 10         | 5      | Above Avg  |
| EPP27C     | Communication                  | 10         | 5      | Above Avg  |
| EPP28C     | Communication                  | 10         | 5      | Above Avg  |
| EPP29C     | Communication                  | 10         | 5      | Above Avg  |
| EPP30C     | Communication                  | 10         | 5      | Above Avg  |
| EPP31C     | Communication                  | 10         | 5      | Above Avg  |
| EPP32C     | Communication                  | 10         | 5      | Above Avg  |
| EPP33C     | Communication                  | 10         | 5      | Above Avg  |
| EPP34C     | Communication                  | 10         | 5      | Above Avg  |
| EPP35C     | Communication                  | 10         | 5      | Above Avg  |
| EPP36C     | Communication                  | 10         | 5      | Above Avg  |
| EPP37C     | Communication                  | 10         | 5      | Above Avg  |
| EPP38C     | Communication                  | 10         | 5      | Above Avg  |
| EPP39C     | Communication                  | 10         | 5      | Above Avg  |
| EPP40C     | Communication                  | 10         | 5      | Above Avg  |
| EPP41C     | Communication                  | 10         | 5      | Above Avg  |
| EPP42C     | Communication                  | 10         | 5      | Above Avg  |
| EPP43C     | Communication                  | 10         | 5      | Above Avg  |
| EPP44C     | Communication                  | 10         | 5      | Above Avg  |
| EPP45C     | Communication                  | 10         | 5      | Above Avg  |
| EPP46C     | Communication                  | 10         | 5      | Above Avg  |
| EPP47C     | Communication                  | 10         | 5      | Above Avg  |
| EPP48C     | Communication                  | 10         | 5      | Above Avg  |
| EPP49C     | Communication                  | 10         | 5      | Above Avg  |
| EPP50C     | Communication                  | 10         | 5      | Above Avg  |
| EPP51C     | Communication                  | 10         | 5      | Above Avg  |
| EPP52C     | Communication                  | 10         | 5      | Above Avg  |
| EPP53C     | Communication                  | 10         | 5      | Above Avg  |
| EPP54C     | Communication                  | 10         | 5      | Above Avg  |
| EPP55C     | Communication                  | 10         | 5      | Above Avg  |
| EPP56C     | Communication                  | 10         | 5      | Above Avg  |
| EPP57C     | Communication                  | 10         | 5      | Above Avg  |
| EPP58C     | Communication                  | 10         | 5      | Above Avg  |
| EPP59C     | Communication                  | 10         | 5      | Above Avg  |
| EPP60C     | Communication                  | 10         | 5      | Above Avg  |
| EPP61C     | Communication                  | 10         | 5      | Above Avg  |
| EPP62C     | Communication                  | 10         | 5      | Above Avg  |
| EPP63C     | Communication                  | 10         | 5      | Above Avg  |
| EPP64C     | Communication                  | 10         | 5      | Above Avg  |
| EPP65C     | Communication                  | 10         | 5      | Above Avg  |
| EPP66C     | Communication                  | 10         | 5      | Above Avg  |
| EPP67C     | Communication                  | 10         | 5      | Above Avg  |
| EPP68C     | Communication                  | 10         | 5      | Above Avg  |
| EPP69C     | Communication                  | 10         | 5      | Above Avg  |
| EPP70C     | Communication                  | 10         | 5      | Above Avg  |
| EPP71C     | Communication                  | 10         | 5      | Above Avg  |
| EPP72C     | Communication                  | 10         | 5      | Above Avg  |
| EPP73C     | Communication                  | 10         | 5      | Above Avg  |
| EPP74C     | Communication                  | 10         | 5      | Above Avg  |
| EPP75C     | Communication                  | 10         | 5      | Above Avg  |
| EPP76C     | Communication                  | 10         | 5      | Above Avg  |
| EPP77C     | Communication                  | 10         | 5      | Above Avg  |
| EPP78C     | Communication                  | 10         | 5      | Above Avg  |
| EPP79C     | Communication                  | 10         | 5      | Above Avg  |
| EPP80C     | Communication                  | 10         | 5      | Above Avg  |
| EPP81C     | Communication                  | 10         | 5      | Above Avg  |
| EPP82C     | Communication                  | 10         | 5      | Above Avg  |
| EPP83C     | Communication                  | 10         | 5      | Above Avg  |
| EPP84C     | Communication                  | 10         | 5      | Above Avg  |
| EPP85C     | Communication                  | 10         | 5      | Above Avg  |
| EPP86C     | Communication                  | 10         | 5      | Above Avg  |
| EPP87C     | Communication                  | 10         | 5      | Above Avg  |
| EPP88C     | Communication                  | 10         | 5      | Above Avg  |
| EPP89C     | Communication                  | 10         | 5      | Above Avg  |
| EPP90C     | Communication                  | 10         | 5      | Above Avg  |
| EPP91C     | Communication                  | 10         | 5      | Above Avg  |
| EPP92C     | Communication                  | 10         | 5      | Above Avg  |
| EPP93C     | Communication                  | 10         | 5      | Above Avg  |
| EPP94C     | Communication                  | 10         | 5      | Above Avg  |
| EPP95C     | Communication                  | 10         | 5      | Above Avg  |
| EPP96C     | Communication                  | 10         | 5      | Above Avg  |
| EPP97C     | Communication                  | 10         | 5      | Above Avg  |
| EPP98C     | Communication                  | 10         | 5      | Above Avg  |
| EPP99C     | Communication                  | 10         | 5      | Above Avg  |
| EPP100C    | Communication                  | 10         | 5      | Above Avg  |
| EPC0NC     | Conduct                        | 10         | S      | SAT        |
| ECRC1A     | Recommendation for Advancement | 10         | R      | Rec Adv    |

For each competency, enter the rating numeric or alpha value, or click on magnifying glass to lookup available Rating choices.  
**Reminder:** You can save your work at any time. The review does not have to be completed before you can save it. Frequent saves prevent the loss of data in the event of computer problems.

Click on the **Note** button to view full description of competency and enter comments. These comments replace the Administrative Remarks CG-3307.

You will receive this warning when entering an alpha code for the Conduct and Recommended/Not Recommended for Adv competency. Click **OK**. You can safely ignore this warning.



## EMPLOYEE REVIEW (continuation)

### Lookup Rating

Review Rating: [ ]  
Description: [ ]  
Short Description: [ ]  
[Lookup] [Clear] [Cancel] [Basic Lookup]

### Lookup Rating

Click on **Lookup** or enter criteria in the Description field then click **Lookup**. Refer to On-Line Help or Basics 101 User Guide for entering criteria.

### Search Results

| Review Rating | Description             | Short Description |
|---------------|-------------------------|-------------------|
| 1             | Unacceptable            | Unaccept          |
| 2             | Poor                    | Poor              |
| 3             | Below Standard          | Below Stand       |
| 4             | Average                 | Average           |
| 5             | Above Average           | Above Avg         |
| 6             | Excellent               | Excellent         |
| 7             | Superior                | Superior          |
| N             | Not Recommended for Adv | No Adv            |
| R             | Recommended for Adv     | Rec Adv           |
| S             | Satisfactory            | SAT               |
| U             | Unsatisfactory          | UNSAT             |

Select the appropriate **Review Rating, Description** or **Short Description** from the list. Once you click on the rating or description it will return to the Reviewers page and automatically fill-in the field and display a short description to the right of the field. See the notes above to determine whether you should use the numeric or alpha codes.

### Competency and Comment Screen (Displayed after selecting the NOTE button.)

Description: Leadership Factor WORKING WITH OTHERS  
The degree to which this member promoted a team effort in accomplishing work goals.  
1  
2 Exerted little effort between group members  
3  
4 Demonstrated leadership skills  
5  
Comments: [ ]

A full description of the competency is displayed.

Comments are required for Ratings of 1, 2, 7, N-Not Recommended for Advancement, U-Unsatisfactory Conduct and E-6's and above require comments justifying leadership potential. These comments replace the Administrative Remarks (CG-3307). **Note:** You can cut and paste from another application such as Word, Notepad, etc., be aware that apostrophes ('), quotes (") and other special characters will not display correctly after your save the text, reenter any of these characters before saving.

Once comments have been entered, click **OK**. The system will automatically return to the Reviewers page.

After entering the necessary information on the **Reviewers** page, click the **Comments** tab at the top of the page.

- Comments entered here are for **internal routing use only** and will not be saved in the final Employee Review.
- Do not enter comments here for Ratings of 1, 2, 7, N, U or leadership potential for E-6's and above. Enter those comments under the Reviewers tab. (See previous instruction on entering comments for ratings of 1, 2, 7, N, U or leadership potential for E-6's and above.)

### Click on the Comments Tab

Employee Name: [ ] Employee ID: 1234567 Empl Rcd#: 0

Review Details: Effective Date: 05/31/2002 Next Review Date: [ ]  
Business Unit: AUSCG AUSCG  
Job Code: 436093 YN1  
Evaluation Type: Supervisor/Manager  
Reviewer ID: 1234567  
Comment: [ ]

Save Return to Search Refresh

Enter comments you may want to forward to your Supervisor, Approving Official, etc..

## EMPLOYEE REVIEW (continuation)

After entering the necessary information on the **Comments** page, click the **Exceptions** tab at the top of the page.

- Enter the Employee ID number of the next person to review this Employee Review.
- Click the **Validate Employee Review** button. Review the exceptions to see if any changes to the Employee Review are required. After changes have been made, click on **Validate Employee Review** again. Repeat until exceptions are corrected. Note: You can safely ignore this warning "**All marks with Rating Model of EVAL must have the Evaluation Type set to A (Approved Official). Evaluation Type=R,**" unless you are the Approving Official.
- Press **Save**.
  - **If you are not the final Approving Official:**
    - ❖ Press **Submit**. OR
    - ❖ Print the **Member Counseling Report**, then press **Submit**.

The **Member Counseling Report** is a printout of the Employee Review with the Reviewer Comments (PG-7's), requiring signature by the counselor and the evaluatee. Refer to the instructions in this guide to print the Member Counseling Report.

- **If you are the final Approving Official, ensure a Member Counseling Report is printed prior to selecting the Final box.** Click the **Final** checkbox and then the **Submit** button.

Once the Final box is checked, you will not be able to view or change the Employee Review, nor will you be able to print the Member Counseling Report. If you need to recall the Employee Review contact HRSIC (ADV) via email at [hsrc-adv@hsrc.uscg.mil](mailto:hsrc-adv@hsrc.uscg.mil) or call (785) 339-3400.

- After clicking **Submit**, the Employee Review is routed to either the Endorser's Worklist, or if final is checked, to HRSIC (ADV) pending review and forwarding to the members Employee Review Summary (formerly CG-3306). (For information on accessing your Worklist, refer to the On-Line Help <http://cgweb.uscg.mil/g-w/hsrc/Direct-Access>). If an Employee Review is submitted multiple times to an endorser, it will display multiple times in the endorser's Worklist; however, only the latest version will display when the endorser accesses any of the multiple links.
- To repeat this function for another Employee, select **Return to Search**.

**Click on the Exceptions Tab**

Enter your endorser's Employee ID or use the lookup to locate their Employee ID number.

Click **Validate Employee Review**. A list of exceptions (discrepancies) will appear. Review the exceptions and make any necessary changes. After changes have been made, click on **Validate Employee Review** again. Repeat until exceptions are corrected.

After exceptions are corrected, click **Save**.

Refer to the next section of this guide for instructions on the **Member Counseling Report** before clicking **Submit** or checking the **Final** box.

## EMPLOYEE REVIEW – MEMBER COUNSELING REPORT (continuation)

After an Employee Review is verified by an Approving Official, a **Member Counseling Report** should be printed. This is a printout of the Employee Review with the Reviewer Comments (PG-7's), requiring signature by the counselor and the evaluatee.

After entering and saving all necessary information, click on the **Member Counseling Report** link located on the **Exception** page.

**Click on the Exceptions Tab**

**Click on Member Counseling Report link.**

- After clicking on the **Member Counseling Report** link the **Member Counseling Receipt** page is displayed.
- **Language** defaults to English.
- Enter the Employee ID number of the evaluatee in the **Report Requests Parameters** box. If you do not know the Employee ID number you may:

- Close the window by clicking the **X** in the top right corner and locate the Employee ID number from the **Exceptions** page **ID** field, then re-select the **Member Counseling Report** link. OR
- Click on the magnifying glass to the right of the Employee ID field and perform a search. For information on performing a search, reference the On-Line Help at <http://cgweb.uscg.mil/g-w/hsrc/Direct-Access>.

**NOTE:** You may generate more than one report by pressing the **+** button to add a new row and enter another Employee ID number. Repeat this step to enter additional Employee ID numbers.

- Click the **Run** button (upper right hand corner of the page) to begin processing.

After entering the Employee ID number(s), click **Run**.


Enter the **Employee ID number**. If you do not know the Employee ID number, click on the magnifying glass to perform a search or refer to the instructions above to locate the Employee ID number.

Click the **“+”** if you wish to add additional Employee ID numbers.



## EMPLOYEE REVIEW – MEMBER COUNSELING REPORT (continuation)

After clicking **RUN** from the Member Counseling Receipt page, the **Process Scheduler Request** page will appear.

- Click on the **Server Name drop-down arrow** and select **PSUNX**.
- Click on the **Type drop-down arrow** and select **Email**. By selecting **Email** the Member Counseling Report will be sent to you as an attachment to an email message (recommended). The attachment will be in **PDF** (Adobe Acrobat) format. You may leave the type as **Web** if you want to access the Member Counseling Report using the Report Manager (**Web** instructions are in the next section).
- **Format** defaults to **PDF**. Leave as PDF, do not change the format.
- **If you selected Email as the type:**
  - Click on **OK** (bottom left corner of page) and this will generate the email to you. **OR**
  - Click on the **Distribution icon**  to add additional email addresses. This is helpful if you would like to email the Employee Review to additional recipients. Refer to instructions below for using the Distribution icon.

**Process Scheduler Request**

Home > Develop Workforce > Plan Careers > Report > Member Counseling Receipt

Process Scheduler Request

User ID: 1234567

Server Name: PSUNX Run Date: 07/11/2002  
Recurrence: Run Time: 5:03:26PM  
Time Zone: Reset to Current Date/Time

Process List

| Select                              | Description     | Process Name | Process Type | Type  | Format |
|-------------------------------------|-----------------|--------------|--------------|-------|--------|
| <input checked="" type="checkbox"/> | Employee Review |              |              | Email | PDF    |

Click on the **Server Name drop-down arrow** and select **PSUNX**.

Click on the **Type drop-down arrow** and select **Email**. If you select **Web**, refer to the instructions in the next section.

Leave Format as **PDF**.

Click on the **Distribution icon** if you wish to email additional recipients a copy of the Employee Review.

Click **OK**.

**Distribution Detail**  
(Displayed if Distribution icon is selected)

Home > Develop Workforce > Plan Careers > Report > Member Counseling Receipt

Distribution Detail

Process Name: CGEERCPT  
Process Type: SQR Report

Distribute To

| ID Type | *Distribution ID |
|---------|------------------|
| User    | 1234567          |

Click the "+" button to add a new row, then enter the Employee ID number in the **Distribution ID** field. If you do not know the recipient's Employee ID number, look up the number by clicking on the magnifying glass.

Click the "OR" button to add a new row, then enter the Employee ID number in the **Distribution ID** field. If you do not know the recipient's Employee ID number, look up the number by clicking on the magnifying glass.


Enter a **Subject** in the **Subject** field and/or a **message** in the **message** field. These are optional.

Enter recipient(s) email address(es) in the **Email Address List** box. Enter each email address on a separate line.

Click **OK**.

## EMPLOYEE REVIEW – MEMBER COUNSELING REPORT (continuation)

If you chose **Web** from the Process Scheduler Request screen, you will need to click on **Report Manager** from the **Member Counseling Receipt** page.

- Find the **Process Instance**. You may need to reference the date and time to determine which one is the correct instance.
- Click the **View** link to the right of the instance you want to view. This will cause a new **Internet Explorer** window to open. The **Report/Log Viewer** page will display.
- If the **View** link is not shown, click the **Refresh** button to update the display. There could be some delay before the Employee Review is ready for viewing.
- When the **Report/Log Viewer** page appears, locate the **link** that has a **PDF** extension. (Link name should read similar to **cgeercpt\_xxxxx.pdf**. The **xxxxx** in the link will be replaced with the Process Instance number.) **Click on the link to open the Employee Review form.**
- Click on the **Printer icon**  (upper left corner) of the Acrobat window to print the form.

**Member Counseling Receipt**

Click on **Report Manager**.

Report Manager Process Monitor Run

Language: English

Enter an Emplid or Enter Board

Enter Board Information

Brd Type Cdt: AD/Res Ind:Sequence:

Flush Execute

Report Request Parameters

1234567 Employee Name View All First 1 of 1 Last

**Report Manager Screen**

Report List Archived Reports

View Reports For

User: 1234567

Status: Last: Days Refresh

| Select                              | Report Prcs ID | Instance | Report Description      | Request Date/Time    | Format          | Status | Details      |
|-------------------------------------|----------------|----------|-------------------------|----------------------|-----------------|--------|--------------|
| <input checked="" type="checkbox"/> | 2814           | 12772    | Employee Review Receipt | 07/11/2002 5:13:46PM | Acrobat (*.pdf) | Posted | Details View |

Locate the Process Instance number, click on **View**. If View is not available, click on **Refresh**.

**Report/Log Viewer**

Instance: 12772 Type: SQR Report  
Name: CGEERCPT Run Cntl ID: REPORT  
Status: Success Submitted By: 1234567  
Server: PSUNX Recurrence:

**Employee Review Receipt**

| Name                               | Size       | Created             |
|------------------------------------|------------|---------------------|
| <a href="#">Message Log</a>        | 1090 bytes | 2002-07-11 21:22:07 |
| <a href="#">Trace File</a>         | 0 bytes    | 2002-07-11 21:13:57 |
| <a href="#">cgeercpt_12772.PDF</a> | 3714 bytes | 2002-07-11 21:22:07 |

Locate the link with the **PDF** extension. Click on the link.

**Acrobat Window**

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print

Address http://cghmdev.osc.uscg.mil/7030/servlets/psevents/print/2830/cgeercpt\_12772.PDF

Member Counseling Receipt

Emplid: 1234567  
Brf Da: 07/11/2002  
From: CGA  
Next: CGA  
Business: CGA  
Department: CGA  
Company: CGA  
Job Code: 12345  
Position: 12345678  
Rating Scale: EG  
Rating Model: EVAL

Active Coast Guard Employees  
First Class Yeoman  
Active  
First Class PO Review  
Enlisted Performance Eval

Click the **Printer icon** to print the Employee Review.  
Click the **Disk icon** to save it